Gathering CAFM requirements: how to ensure your project succeeds

Specifying any new software can be a complicated and involved affair. Paul Djuric, head of Techniche EMEA, highlights how best to gather your requirements for a CAFM roll-out and how to avoid some common mistakes.

According to the Project Management Institute, 47% of unsuccessful projects fail to meet goals due to poor requirements management. And implementing a new computer-aided facilities management (CAFM) system is no exception – solid requirements gathering forms the foundation of a successful project.

Known for bringing about major changes in the way your team functions and in the way facilities management is perceived within your business, a CAFM system's most obvious benefits are improving asset performance, automating maintenance workflows and reducing maintenance costs.

But the early stages of such projects are often over-looked, which can lead to problems further down the line. Managing the technology is the easy part: it is your people management skills that will be

put to the test.

Best steps for gathering requirements

Requirements gathering should take place at an early stage, helping to shape your brief. Regardless of project size, the most fruitful way to begin is always with workshops involving relevant stakeholders from procurement, IT, HR, legal, finance, marketing and operations. This will enable you to develop engagement with all parties at an early stage, steer their input and overcome any potential blockages before they might become an issue.

This early buy-in is essential – after all, success will be judged by how quickly your software project is adopted, how efficiently it is used and how effectively it impacts the business.

The workshop format is particularly effective, as it gives you an opportunity to meet face-to-face and get a true sense of people's feelings, stories and requirements. Workshops also give you a chance to clearly present your reasons for change, so participants understand the need for the process and stay focused on the same objectives.

Workshops can uncover and address underlying tensions, concerns and misconceptions about what the project is trying to achieve. It is far better to get these out of the way at the beginning, rather than allow them to seep through later and risk the delivery of the project partway through.

Recently we ran a series of workshops with a client to build the SoW (Statement of Work) document. As expected, the workshops revealed some conflicts and also some misinterpretation of their own processes. We were able to advise on simplifying these processes and subsequently guide them through their requirements gathering with a clearer sense of direction, constantly challenging their requirements to ensure they were scalable, flexible and future proof.

Maintaining focus

Depending on the size and type of your business, you may want to set up a project management team that draws from the different areas of your organisation. Some of your stakeholders are likely to be ideal candidates for a governance board, brought together to help steer your project and maintain focus. Typically consisting of four to seven people, a governance board is also a good way to ensure information is retained and passed on in the event of employee changes. At the very least, your project should have a board-level or C-suite sponsor right from the start.

Common mistakes and pitfalls

Not engaging the right people at the start is a common problem with CAFM projects. You need to identify all your stakeholders across the business, and system users will inevitably play a big part in conversations. Operations and procurement teams need to know and agree on what you are trying to achieve, and why, in order to avoid any painful scope creep.

You should also make sure you outline or share the objectives and agenda for the CAFM requirements

gathering process. Failing to do so can cause misunderstandings that hinder productive collaboration. If people have not been through this process before, they may have misconceptions about what it involves, so it is important to communicate effectively with the entire stakeholder group at every stage.

Requirements need to be revisited throughout the lifecycle of a CAFM project to avoid damaging expectations. For example, if a key stakeholder leaves the business partway through a project, as recently happened at one of our customers, it can appear that requirements have changed. If a project is started by one party and delivered to another, this disconnect can sometimes mean the new team believes that the system does not meet the objectives. To ensure successful project delivery, the requirements specified at the outset should be constantly monitored.

What makes it onto the wish list?

Every business has its own priorities but in all cases, understanding the 'why' and the value to your business of each requirement (or omission) is key.

Ultimately, many decisions come down to the cost/benefit ratio. If a particular feature or function is going to cost more, is it worth it? Are there any legal implications and will there be a knock-on effect from not doing it? What is the opportunity cost of not doing it?

Make sure that you consider managing for today, as well as planning for tomorrow. Both are of equal importance to the overall project but will be given different emphasis by different stakeholders. So build the capacity for both into your plan.

Ask lots of questions, and keep asking them. Only when you have your answers can you set the agenda around the scope of work – don't try to do things the other way around.

Define what good looks like. This should be your point of focus throughout. Is it set reporting? Reduction in costs? Efficiency improvements? What is your main driver? Without identifying your key objectives, you can't prioritise, or to make decisions on what is essential, what is important, and what would simply be nice to have.

Evaluating stakeholder input

Once you have created your prioritised list of requirements, make sure that you have addressed any conflicting requests and investigated anything that you suspect may
be based on an assumption, rather than fact. Inevitably, you are likely to end up with some 'wish list' items that won't make the priority list.

This is the point at which you need to play your findings back to the stakeholders and check your understanding. It's important to emphasise that this is not a SoW, but that the priority requirements will go forward to form the scope of the project.

Demonstrating your ability as a strategic thinker

In the face of internal politics and competing agendas, requirements gathering demands careful management. Establishing a common purpose is important, as is reaching consensus on what the system should achieve. But if configured properly, a new facilities management platform will drive collaboration and help colleagues operate more effectively, bringing benefits to both those involved in the project and the business as a whole.

Taking a planned and collaborative approach to the project is essential to the success of your system's implementation. More than that, an engaging and relevant process for gathering your requirements can change perceptions of the FM role. Even creating greater visibility at board level while demonstrating your ability to deliver meaningful change and achieve strategic goals. Well before any implementation begins, this process offers you a vital opportunity to solidify your position as a leader, project manager and strategic thinker.

By Paul Djuric, head of Techniche EMEA. Gained over many years, the Techniche team has in-depth experience of rolling-out CAFM (computer-aided facilities management) projects for fuel retailers, from single sites to complex multinational brands including BP, Q8 and AECOM. Urgent is a facilities management software platform currently used in 30,000 sites across 34 countries. Urgent is a Techniche product.

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